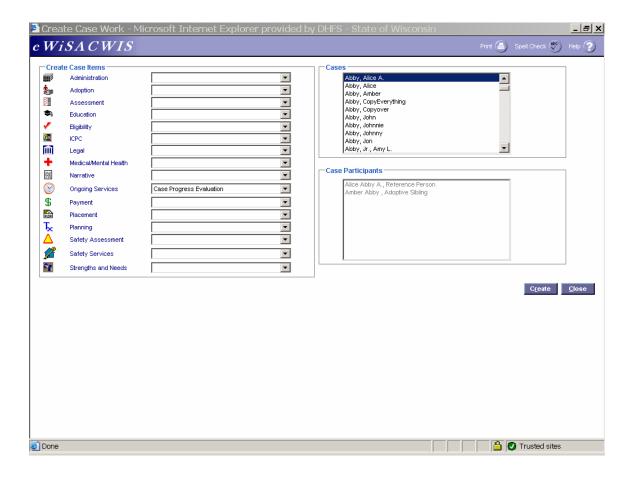
Case Progress Evaluation

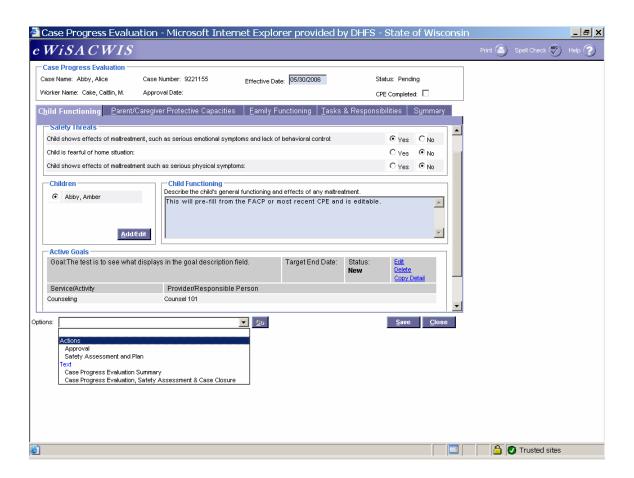
The Case Plan Evaluation (CPE) is created via Create > Case Work > Ongoing Services
 > Case Progress Evaluation > Family Name and Create. The CPE <u>cannot</u> be created
 without an approved Family Assessment and Case Plan or a Case Progress Evaluation
 already in an ongoing status.



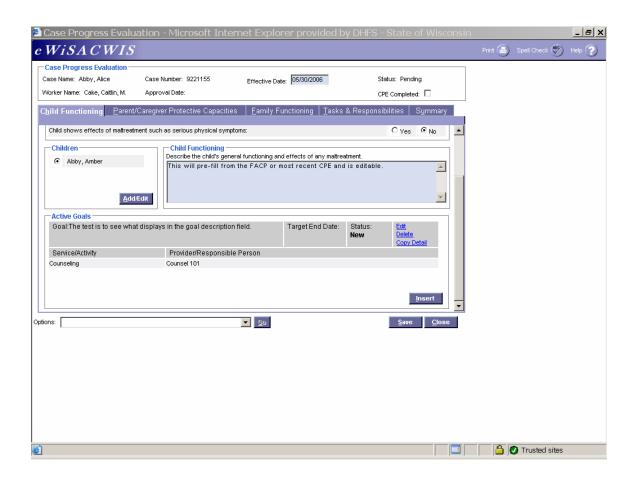
2. When the CPE opens the first group box is Case Progress Evaluation. The Case Name, Worker Name, and Case Number will pre-fill. The effective date is user entered. The CPE Completed box must be checked prior to final approval.

- 3. The Child Functioning Page will pre-fill from the most current Family Assessment and Case Plan or most recent Case Progress Evaluation. The Safety Threats and Child Functioning areas are editable.
 - Select the radio button next to the corresponding name to view and edit the appropriate Child Functioning information.
- 4. Any Active Goals will be listed in the Active Goals Group Box. The Goals for the first CPE have a hyperlink of Edit, Delete, and Copy Detail. Edit will allow the user to update the Goal. Delete will delete the entire Goal from the CPE. Copy Detail will copy the Goal from one participant to another.
- 5. Options will allow the Approval of the CPE. Safety Assessment and Plan value is view only. If any changes are needed on the Safety Assessment and Plan, the user must access it from the outliner under the current CPE.

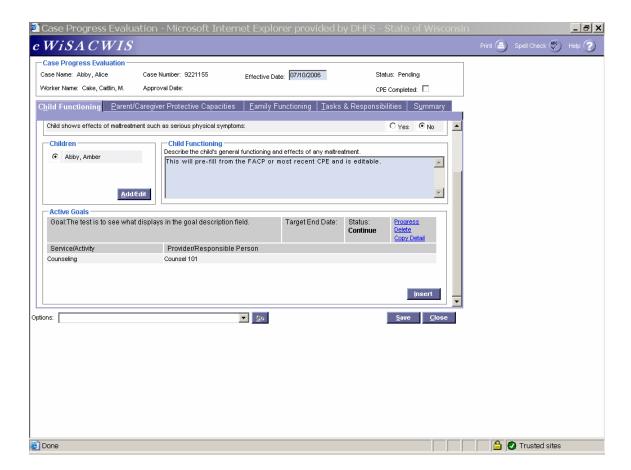
The Case Progress Evaluation Summary and Case Progress Evaluation, Safety Assessment and Case Closure templates should be launched prior to final approval.



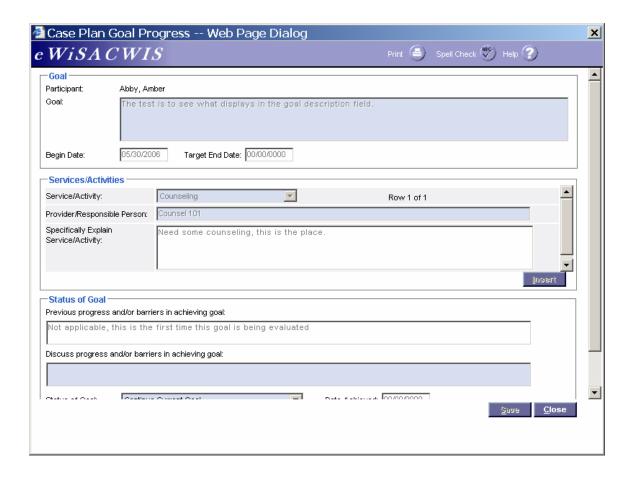
6. New Goals can be inserted by selecting the Insert button at the bottom of the Active Goals Group Box. See the instructions on how to add new goals from the Quick Reference Guide – Family Assessment and Case Plan.



7. The Progress Hyperlink will appear after the first CPE has been created and saved. Subsequent CPE will have the Progress Hyperlink next to the Goals.

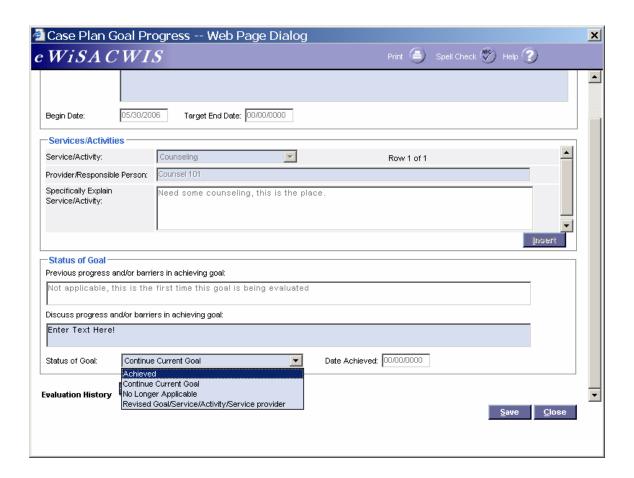


8. When the Progress Hyperlink is selected, the Case Plan Goal Progress page appears. The Goal and Service/Activities Group Boxes are view only. This information is for the worker to evaluate the progress the participant(s) have made in achieving the goal.



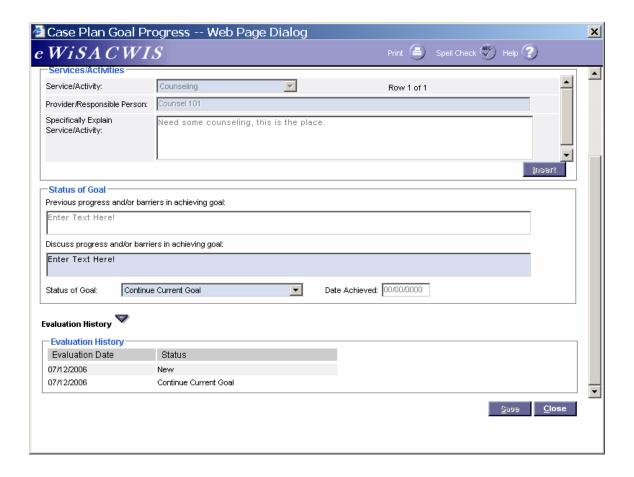
9. The Status of Goal is a user-entered Group Box. If this was an Ongoing Goal, 'Previous Progress and/or barriers in achieving goal' narrative box would be read only. 'Discuss progress and/or barriers in achieving goal' narrative box is enabled and required to document progress for a new goal.

The Status of Goal is a drop down value. Select an appropriate value. If the status is Achieved, the Date Achieved would become mandatory.

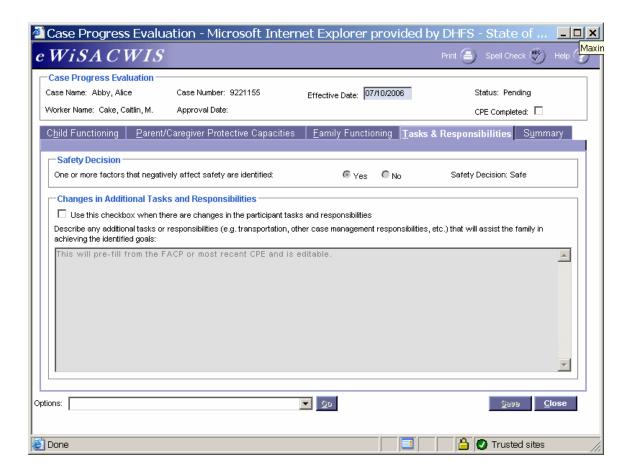


11. The Evaluation History is an outline of every time the goal has been evaluated for progress. It documents the date and status of the evaluation for the goal.

Select Save and Close to return to the Child Functioning Tab.



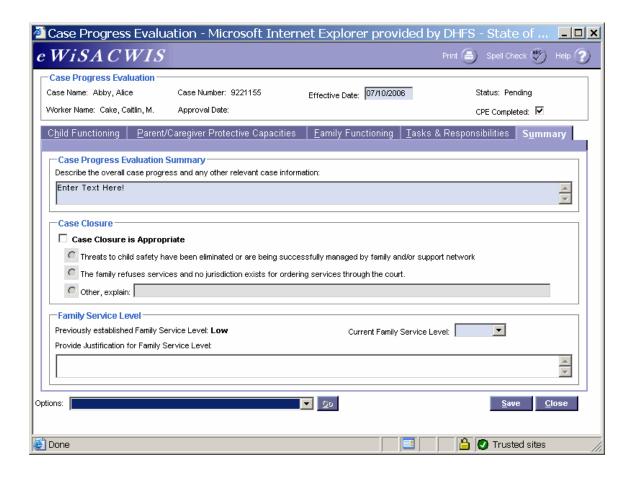
- 12. Continue to complete the Parent/Caregiver Capacities and Family Functioning Page using the same technique in completing the pages as you did on the Child Functioning Page.
- 13. The next tab is Task and Responsibilities. The Safety Decision Group Box will pre-fill based on the Safety Threats that were identified on the Child Functioning, Parent/Caregiver Protective Capacities, and Family Functioning Tabs.
- 14. If there are Changes in Additional Tasks and Responsibilities, check the checkbox which will make the narrative area editable and enter any additional information. If there is no additional information, leave the box unchecked and the previous information will be saved.



15. The final tab is the Summary Tab. The Case Progress Evaluation Summary Group Box contains a narrative area in which to document the overall case progress.

If it has been determined that the case can be closed, select the Case Closure is Appropriate check box and select the appropriate reason below. Note: this will not send the case for case closure process. This still needs to be requested through Maintain Case.

Select the appropriate Current Family Service Level.



16. Finally, make sure the CPE Complete check box is checked off, select Approve from the Options drop down value and select go to send the CPE for final approval.

